

40050-0312-060

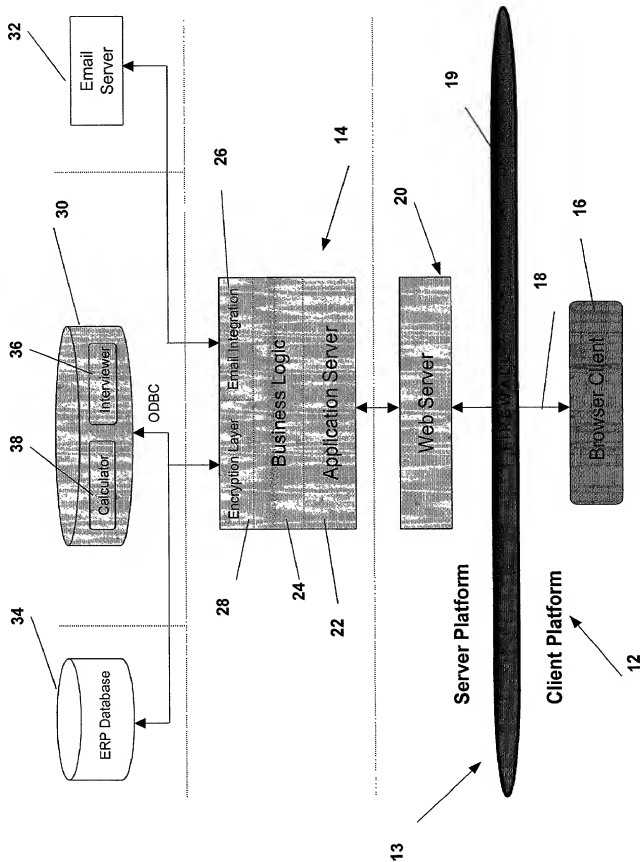


Figure 1

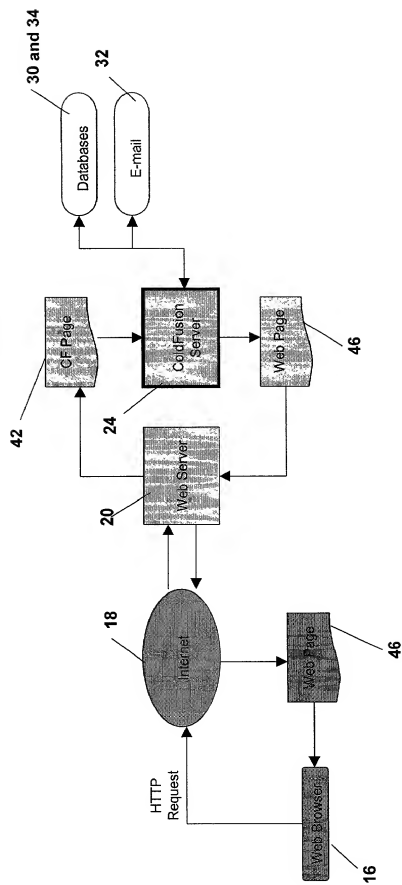
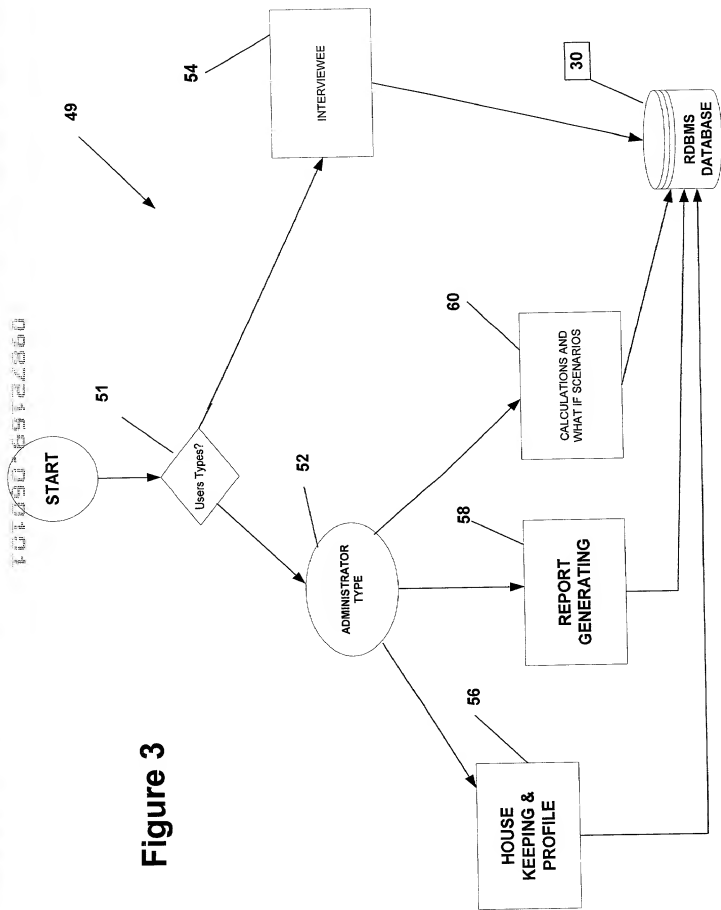


Figure 2

Figure 3



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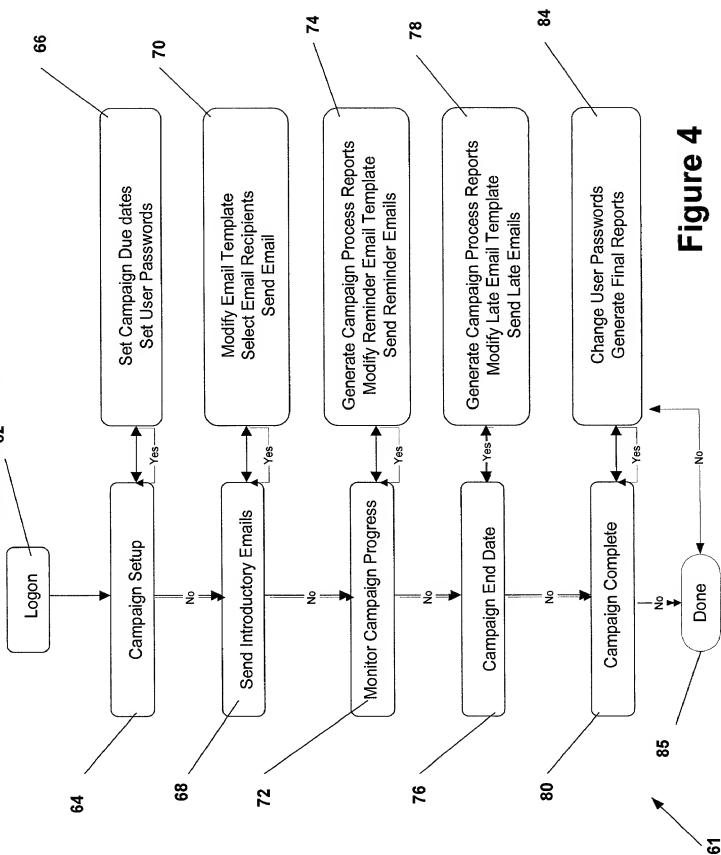


Figure 4

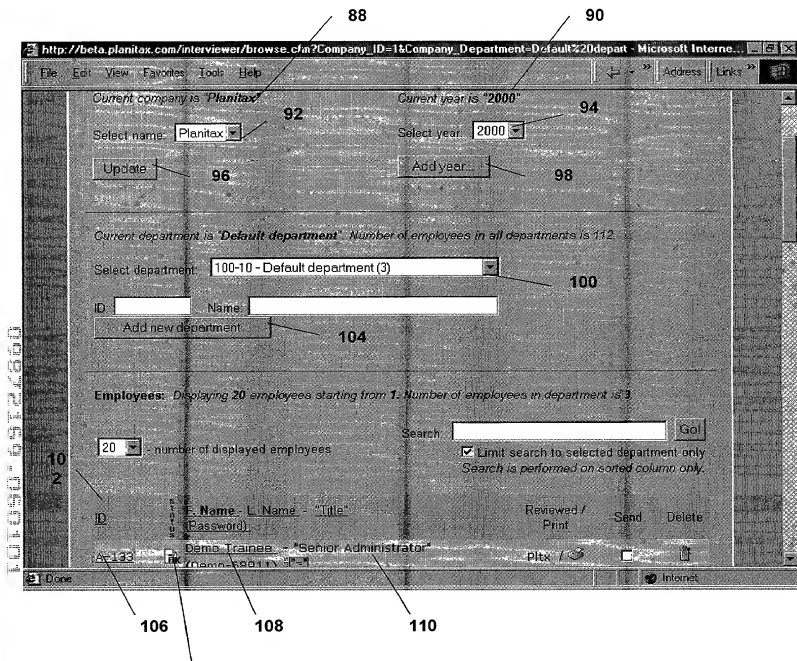


Figure 4a

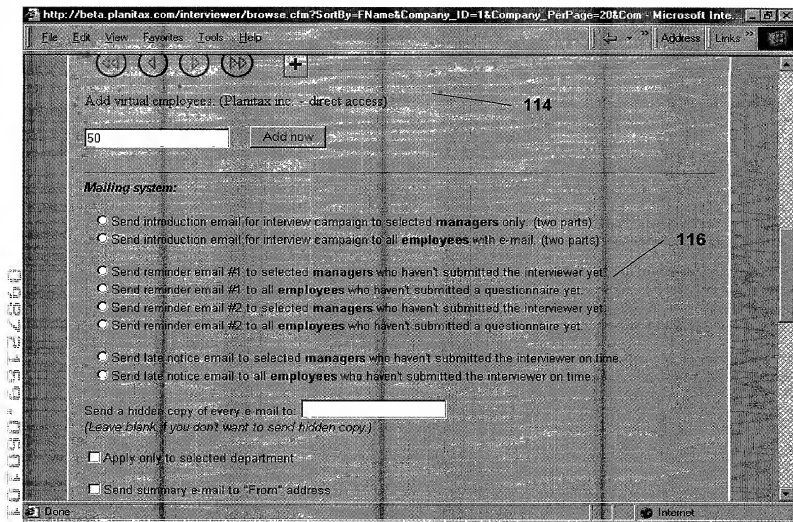


Figure 4b

http://beta.planitax.com/interviewer/browse.cfm?SortBy=FName&Company_ID=1&Company_PoiPage=20&Com - Microsoft Inte...

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Administrators information:

Representative password: (password that must be entered at the first screen) (this field applies to all years)

Return mail: from mail listed in all mail invitations/reminders

Admin 1 (on-line help) **Admin 2** **Admin 3**

| | | | |
|-------------|---|--|---|
| First name: | <input type="text" value="Dante"/> | <input type="text" value="Bill"/> | <input type="text" value="Guest"/> |
| Last name: | <input type="text" value="Orlando"/> | <input type="text" value="Rebbeck"/> | <input type="text" value="User"/> |
| Email: | <input type="text" value="dante@planitax.com"/> | <input type="text" value="bill@planitax.com"/> | <input type="text" value="lon@planitax.com"/> |
| Password: | <input type="text" value="demo1"/> | <input type="text" value="demo1"/> | <input type="text" value="guest"/> |

120

Employee Passwords: 122

Reports: 124

Done Internet

Figure 4c

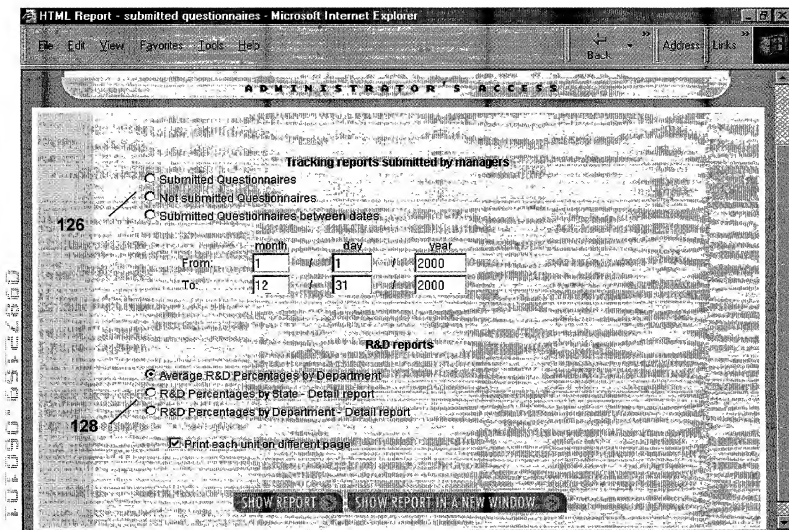



Figure 4d

HTML Report - submitted questionnaires - Microsoft Internet Explorer

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 **WORLDWIDE FINANCIAL CORP.**

[GO BACK](#)

R&D Tax Credit - Summary reports

Average R&D Percentages by Department

Calendar year: 2000

| Department | Department name | No. of quest. for dept | Average R&D % |
|-------------------------|---------------------------|------------------------|---------------|
| 100-10 | Default department | 1 | 0 |
| 100-1001 | Architecture & Validation | 9 | 60 |
| 100-1002 | KVZ Development Team | 11 | 59 |
| 100-1006 | PC Firmware | 13 | 77 |
| 100-1007 | PC-GM | 5 | 0 |
| 100-1011 | R&D SW 1 | 9 | 17 |
| 100-1014 | S/W Localization | 17 | 0 |
| 100-1015 | System Interfaces | 10 | 49 |
| 100-1016 | Software Validation | 9 | 00 |
| 100-1019 | PRX Hardware | 8 | 26 |
| Summary: 11 departments | | | |

[GO BACK](#)

Figure 4e

http://beta.planitax.com/interviewer/report_detailed_state.cfm?CompID=1&Break=100&CFID=898&CFTOK= Microsoft Internet...

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R&D Questionnaire

Detail Report by State

Calendar year: 2000

State: CA

| Employee name | Lastname | Title | Dept. num | Research | Superv. | Support | R&D | non R&D |
|---------------|-------------------------|-------------|-----------|----------|---------|---------|-----|---------|
| Melanie | Z | Camberlango | Tester | 0 | 0 | 0 | 0 | 100 |
| CA | Average | | | 0 | 0 | 0 | 0.0 | 100.0 |
| State: CA | Average all departments | | | 0 | 0 | 0 | 0.0 | 100.0 |

State: CA

| Employee name | Lastname | Title | Dept. num | Research | Superv. | Support | R&D | non R&D |
|---------------|-------------------------|--------------------|-----------|----------|---------|---------|-------|---------|
| Demo2000 | | engineer | 100-10 | 50 | 50 | 0 | 100 | 0 |
| Paul | Jordan | Manager | 100-10 | 0 | 80 | 0 | 100 | 0 |
| CA | Average 100-10 | Default department | | 25 | 65 | 0 | 100.0 | 0.0 |
| State: CA | Average all departments | | | 25 | 65 | 0 | 100.0 | 0.0 |

State: CA

| Employee name | Lastname | Title | Dept. num | Research | Superv. | Support | R&D | non R&D |
|---------------|----------------|--------------------|-----------|----------|---------|---------|-----|---------|
| Mick | Botecelli | vocals | 100-10 | 0 | 0 | 0 | 0 | 100 |
| CA | Average 100-10 | Default department | | 0 | 0 | 0 | 0.0 | 100.0 |
| Brenda | McKenna | Sr. Engineer | 100-1001 | 25 | 5 | 100 | 100 | 0 |
| Christophe | Rosen | Sr. Engineer | 100-1001 | 0 | 4 | 54 | 58 | 42 |
| David | Jow | Sr. Engineer | 100-1001 | 4 | 45 | 4 | 53 | 47 |
| Marc | Lindley | Engineer | 100-1001 | 4 | 4 | 45 | 53 | 47 |
| Matthew | Bailey | Engineer | 100-1001 | 0 | 100 | 4 | 100 | 0 |
| Paula | Hung | Sr. Engineer | 100-1001 | 2 | 8 | 36 | 44 | 54 |

Done Internet

Figure 4f

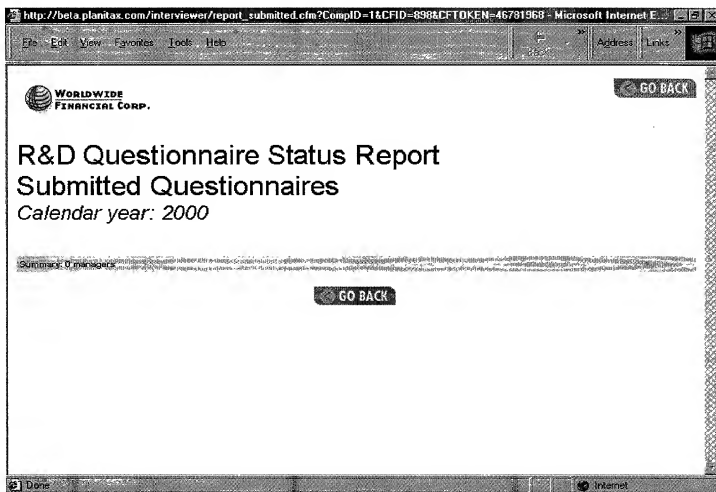


Figure 4g

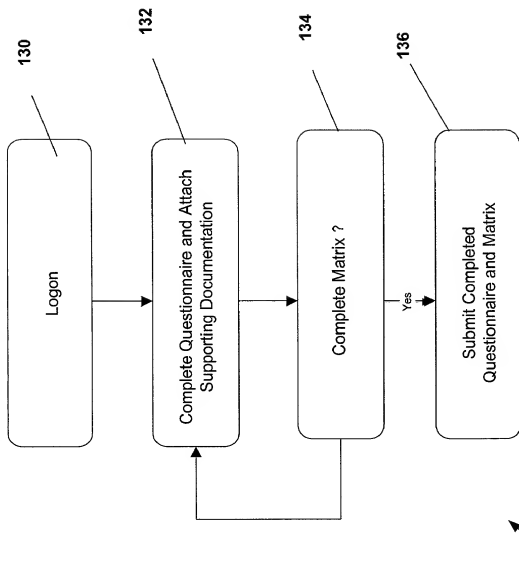


Figure 5

http://beta.planitax.com/interviewer/0001-planitax/questionnaire.cfm?User_ID=000989F1-8BD9-196C-B - Microsoft Internet E...

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QUESTIONNAIRE

INSTRUCTIONS: Your time for submitting the questionnaire has expired! 166

150

General Information

First Name: Paul

Middle Initial:

Last Name: Jordan

152 E-mail: seda@planitax.com

Department #: 100-1006 164

154 Department Name: 100-1006 - PC Firmware

156 Title: Manager

158

Part I: Research and Development Activities - In General

160 Qualify all research and development activities must be performed in the U.S. 168

162 Does your department perform only direct research and development activities?

☐ Yes ☒ No

If **yes**, go to Part II.

2. Does your department perform a combination of direct research and development activities and direct support activities?

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Figure 5a

R&D Interviewer - Microsoft Internet Explorer

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Address Links

MATRIX

MATRIX for manager Brenda McKenna

R&D Percentages:

Direct Research: %

Direct Supervision: %

Direct Support: %

Total R&D %: 130 %

Total non R&D %: 0 %

Save

Warning!

o A red number signals that the sum of the R&D % for a given employee is greater than 100%.

GO BACK **PROCEED**

171

170

Done

Internet

INSTRUCTIONS

QUESTIONNAIRE

DEFINITIONS

R&D

HISTORY

FILES

EXAMPLES

HELP

Revised by

PLANT YORK

Figure 5c

http://beta.planitax.com/interviewer/0001-planitax/matrix.cfm?CompanyID=1&ID=000989F1-8BD9-196C - Microsoft Internet

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Address Links

INSTRUCTIONS

QUESTIONNAIRE

DEFINITIONS

FAQ

HISTORY

PRIZES

SAMPLES

HELP

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Matrix for manager **Paul Jordan**

To expedite the completion of this schedule, insert percentages in all fields before clicking on Enter or Save button.

| Name | State | Direct Research | Direct Supervision | Direct Support | Total R&D % | Total non R&D % |
|----------------------------|-------|--------------------|-----------------------|-------------------|----------------|-----------------------|
| Dave Crump - 100-1006 | MA | 50 | 25 | 0 | 75 | 25 |
| Harsh Olin - 100-1006 | MA | 100 | 0 | 10 | 110 | 0 |
| James Allison - 100-1006 | MA | 45 | 55 | 0 | 100 | 0 |
| Jane Scool - 100-1006 | MA | 30 | 0 | 0 | 30 | 70 |
| Jay Conley - 100-1006 | MA | 80 | 0 | 0 | 80 | 20 |
| Jeffrey Davis - 100-1006 | MA | 60 | 0 | 20 | 80 | 20 |
| Jeffrey Schmidt - 100-1006 | MA | 100 | 0 | 0 | 100 | 0 |
| Laurence Raven - 100-1006 | CA | 50 | 0 | 0 | 50 | 50 |
| Michael Wolf - 100-1006 | MD | 80 | 0 | 0 | 80 | 20 |
| Robert Goodall - 100-1006 | MA | 100 | 0 | 0 | 100 | 0 |
| Robert Salerno - 100-1006 | MA | 50 | 0 | 0 | 50 | 50 |
| Ted Cammari - 100-1006 | MA | 75 | 0 | 0 | 75 | 25 |
| William Doane - 100-1006 | MA | 80 | 0 | 0 | 80 | 20 |
| AVERAGE | | 69.2 | 6.2 | 2.8 | 77.8 | 22.2 |

Done Internet

Figure 5d

R&D Interviewer - client's administrator access - Microsoft Internet Explorer

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Back Address Links

Main administrator access.

Current distributor is "Plantax" **176**

Select distributor: Plantax ☒ New distributor: **174**

Distributor administrators:


| First name | Last name | Email | Username | Password |
|------------|-----------|---------------------------|----------|------------|
| Igor | Gruber | igor.gruber@quest.ames.si | James | htrolma |
| Borut | Hrenjak | | Hrazi | htmlpu |
| Seda | Taysi | seda.taysi@plantax.com | Seda | 111 |
| Lisa | Yap | lisa@plantax.com | Lisa | lisa123455 |
| Mark | Cottam | | demo | demo |

New administrator:

Current company is "Nvidia" **178**

Select company: Nvidia ☒ New company: **180**

Company logo:

 **NVIDIA**

Company name: Nvidia

Internet

Figure 6